Mail To:

PURCHASING DIVISION

200 E WASHINGTON ST SUITE 1522

INDIANAPOLIS, IN 46204 3313

For questions regarding specifications contact:

317 327 4900

THIS IS A REQUEST FOR PROPOSAL FOR ERP COMPUTER SOFTWARE SOLUTION
LICENSE AND SOFTWARE MAINTENANCE AND SUPPORT

PLEASE DISREGARD THE FOLLOWING ITEMS: THIS BID FORM

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ALL RELEVANT INFORMATION TO VENDORS WILL BE FOUND IN THE FOLLOWING
REQUEST FOR PROPOSAL DOCUMENTS

Line	Quantity	Unit	Unit Cost	Total Cost
001	1.00	EA	$_____	$_____

ERP COMPUTER SOFTWARE SOLUTION LICENSE AND SOFTWARE MAINTENANCE AND
SUPPORT

Grand Total: $_____

Firm Name _____   Prices Firm Through _____
                   _   _
Address _____   Payment Terms _____
                   _   _
City, State, Zip _____   Delivery Date ARO _____
                   _   _

Phone # _____   Fax # _____
                    _   _
          BY _____
                         Respresentative (Signature)

                    _____
                         Typewritten Name of Representative

INSTRUCTIONS TO BIDDERS – BIDDERS MUST COMPLY WITH ALL INSTRUCTIONS AS OUTLINED

IMMEDIATE CAUSE FOR REJECTION OF BID
A. Failure to comply with all instructions or to sign all necessary forms including the Request For Bid (RFB) form.
B. Failure to submit a bid surety completely and correctly executed at the time of bid submission in the correct amount (if required).
C. Failure to correctly and completely execute the non-collusion affidavit (if required).
D. Failure to comply with any other mandatory bid requirements.

BONDING REQUIREMENTS
A. Bidders may be required to provide with a bid, at time of submission, a bid surety in either a flat dollar amount or percentage of bid, as specified. Acceptable forms of bid surety as follows:
   1. Bid Bond secured from a bona fide bid surety firm.
   2. A Certified Check (or equivalent) if issued by a financial institution insured by an agency of the United States.
   3. Other Forms of Bid Surety as specified in a particular bid.
   All forms of Bid Surety should be made payable to the City of Indianapolis/Marion County. No cash or personal checks accepted. All bid surety will be held until formal award is made by the appropriate governing body and until successful vendor complies with all terms of the award.
B. Successful bidder may be requested to provide a Performance Bond/Payment Bond in either a flat dollar amount or a percentage of bid as specified, made payable to the City of Indianapolis/Marion County, within ten days after receipt of award letter. Other forms of performance guarantee may be acceptable as specified in a particular bid.

GENERAL CONDITIONS/CONTRACTUAL CLAUSES
A. The City of Indianapolis and Marion County are exempt from Local, State and Federal Taxes and will not be responsible for any taxes levied on vendor as a result of a bid award.
B. All terms contained in this document will become part of contract between successful bidder and the City of Indianapolis/Marion County unless bidder takes exception.
C. The City of Indianapolis and Marion County reserve the right to reject any and all bids and to waive any of the terms and conditions and provisions contained in the Invitation to Bid or other documents, or any informality, irregularity or omission in any bid, and to award to one or more bidders.
D. Bidders may be required to submit City of Indianapolis/Marion County Form #102 (Financial Statement) for non-construction (non-public works) bids, if specified in a particular bid's technical specifications. Bidders may also be required to submit Form #102 for each construction (public works) bid under $100,000.00, if specified in a particular bid's technical specifications.
E. Telegraphic/Facsimile bids are not acceptable unless specified.
F. Manufacturer and/or model number of equipment being bid must be stated.
G. If not bidding a delivered price to point of destination, shipping charges must be shown as a separate price on the RFB form.
H. Upon delivery and/or inspection of ordered goods or upon performance of services, should the ordering agency determine that goods/services do not meet specifications, same will not be accepted and shall be returned at vendor's expense.
I. Reference to brand names, catalogue numbers etc., are made to establish level of quality needed and not for the purpose of limiting competition. It is the vendor's responsibility to show proof that goods being offered are of equal quality to those that were specified.
J. Formal contracts and/or proof of insurability may be required if applicable to the bid.
K. The City of Indianapolis/Marion County reserves the right to deny payment to vendors ordering or delivering goods/services without benefit of a verbal or written purchase order number.
L. Any exceptions to the specifications must be clearly set forth in vendor's bid.
M. All bidders must comply with Consolidated City of Indianapolis Mayor's Execution Order #1, 1987. The apparent low bidder must submit or have on file form CC-09, which may be obtained from the DEO office. Failure to do so may cause your bid to be rejected. Information pertaining to the DEO Program and/or any questions should be directed to: The Division of Equal Opportunity, 200 E. Washington St., Suite 1501, Indpls., IN 46204, (317) 327-5262.
N. The Vendor agrees to indemnify and hold harmless Marion County, Indiana, the City of Indianapolis and its officers, agents, officials, and employees for any and all claims, actions, causes of action, judgments, and liens arising out of any negligent act of omission by the Vendor or any of its officers, agents, employees, or subcontractors or any defect in materials or workmanship or any supply, material, mechanism or other product which it or any of its officers, agents, employees, or subcontractors has supplied to the City/County or has used in connection with this Agreement. Such indemnity shall include attorney's fees, costs and other expenses arising therefrom or incurred in connection therewith and shall not be limited by reason of the enumeration of any insurance coverage required herein.
O. Notwithstanding any other provision of this Agreement, if funds for the continued fulfillment of this Agreement by City/County are at any time not forthcoming or are insufficient, through failure of any entity to appropriate funds or otherwise, then City/County shall have the right to terminate this agreement without penalty by giving prior written notice documenting the lack of funds, in which instance, unless otherwise agreed to by the parties, this Agreement shall terminate and become null and void on the last day of the fiscal period for which appropriations were received. City/County agrees that it will make its best effort to obtain sufficient funds, including but not limited, to including in its budget for each fiscal period during the term hereof a request for sufficient funds to meet its obligations hereunder in full. This contract may be terminated by either party at City's option, upon 30 days written notice.
P. No portion of this Agreement shall be sublet, assigned or otherwise disposed of by Vendor except with the written consent of the City/County being first obtained. Consent to sublet, assign or otherwise dispose of any portion of this Agreement shall not be construed to relieve Vendor of any responsibility for the fulfillment of the Agreement.
Q. Unless otherwise specified within the Agreement, this Agreement shall be governed by the laws of the State of Indiana, and by all Municipal Ordinances and Codes of the Consolidated City of Indianapolis, as the same shall be in full force and effect upon the date this Agreement is executed.
R. This Agreement represents the entire and integrated Agreement between City/County and Vendor and supersedes all prior negotiations, representations, agreements, and/or contracts, either written or oral. This Agreement may be amended only by written instrument signed by both City/County and Vendor and attached hereto as an addendum.

AFFIDAVIT OF NON-COLLUSION

     THE UNDERSIGNED, HAVING BID FOR _____
in accordance with notice given by the Purchasing Division and the City of Indianapolis and/or Marion County for such supplies, merchandise, service or contract for and in behalf of himself, or themselves, being first duly sworn says:

     That said bidder has not directly or indirectly entered into any combination, collusion, undertaking or agreement relative to the price to be bid by any person, or to prevent any bidder, or bidders, from bidding, or to induce any bidder, or bidders, to refrain from bidding for such supplies, merchandise, service or contract, and that said bid so made is without reference or regard to any other bid, or bids, and without agreement, understanding or combination, either directly or indirectly, with any person or persons, with reference to such bidding in any way or manner whatsoever.

STATE OF   _____   Signed) _____

                          } SS:

COUNTY OF   _____

     Subscribed and sworn to before me this _____ day of _____ , 20_____

My commision expires _____   _____
                                                     Notary public   (Seal)

Dated at _____   _____   _____
         City   State   Date

FAILURE TO PROPERLY NOTARIZE AND RETURN THIS FORM WILL INVALIDATE YOUR BID

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The Consolidated City of Indianapolis and Marion County, Indiana
Purchasing Division - Suite 1522
200 E. Washington Street
Indianapolis, IN 46204

Request For Proposals

RFP No: 09-7422

Date of Issue: September 14, 2009

Enterprise Resource Planning - Computer Software

The Consolidated City of Indianapolis and Marion County, Indiana is soliciting proposals for the purchase of a <u>comprehensive, fully integrated</u> Enterprise Resource Planning (ERP) computer software solution to replace City/County's current legacy business systems.

All interested and qualified software vendors offering Enterprise Resource Planning (ERP) computer software applications which can support local city or county entities of similar or larger size are encouraged to submit proposals.

Important Dates

Notice of Intent to Propose	September 30, 2009	(Optional)	
Pre - Proposal Conference	October 7, 2009	2:00 PM	EDT
Vendor Questions Due By	October 9, 2009	4:30 PM	EDT
Proposals Due Date	**October 27, 2009**	**12:00 Noon**	**EDT**

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1.   Introduction

The Consolidated City of Indianapolis and Marion County, Indiana (hereafter "City/County") is soliciting proposals for the purchase of a <u>comprehensive, fully integrated</u> Enterprise Resource Planning (ERP) computer software solution to replace its current legacy business systems.

1.0.1.   An ERP system is commercially-available software that will be used to perform City/County's administrative business functions such as financial accounting, procurement, human resources, payroll, time and attendance, budget management, asset management and other tasks using a common data repository.   The goal is to improve the performance of City/County's resource planning, management control and operational control. This multi-module application software integrates activities across functional departments.

1.0.2.   City/County seeks proposals from all interested and qualified software vendors with ERP computer software products proven successful in supporting local city and/or county entities of similar or slightly larger size.

1.0.3.   The scope of this RFP is:

An ERP Computer Software Solution consisting of ERP Software Products License(s) and Annual Software Maintenance / Support.

1.0.4.   City/County completed an intensive assessment and review of its current legacy systems and business processes. The business case was made for a new, innovative software solution which will provide City/County all the benefits inherent in today's leading software systems.

1.0.5.   This RFP clearly defines the level of functional sophistication desired and begins City/County's search for the ERP software products that will best serve its needs. City/County is looking for the elimination of manual procedures, seamless integration of applications, data sharing from a centralized data structure, significant business process improvements, portals and dashboards in all applications, business rule and workflow capability, automated approval processes and 'push' technology.

1.0.6.   City/County may select a single or multiple vendors to provide Software Product Licenses. All qualified vendors including local, state, MBE/WBE/VBE and other organizations are encouraged to respond. *A second RFP will later address implementation services for this ERP software solution.*

1.0.8.   City/County intends to participate in a software maintenance program to continue to receive the benefits provided by the software solution. As the future affords new technology and functionality, the capacity to easily customize the software solution for current and future functions which are not configurable out-of-the-box, is paramount. There should be capability to separate the customizations from the base software modules in order to minimize the necessity of reprogramming the customizations each time updates are installed.

1.1. Tentative RFP Timeline

Activities	Deadlines
RFP Issued	September 14, 2009
Notice of Intent to Propose (Optional)	September 30, 2009
Pre - Proposal Conference (Questions & Answers)	October 7, 2009 2:00 PM EDT
Vendor's Questions to City/County	October 9, 2009 4:30 PM EDT
Answers Posted	October 14, 2009
Proposals Due	**October 27, 2009 12 Noon EDT**
Vendor Demonstration Sessions (3 days each week)	January 19 - February 4, 2010
On-Site Discovery Dates	March 3 - 4, 2010
City/County selects final vendor(s) for contract negotiations	March 5, 2010
Statement of Work Activities	Begins March 12, 2010
Contract Negotiations and Cost Negotiations	Thru April 23, 2010

1.2. Point-of-Contact

1.2.1.   All inquiries / communication concerning this procurement are to be directed only to email address **rfp7422@indy.gov**.

1.2.2.   Vendors are specifically directed NOT to contact any personnel in City/County for meetings, conferences or technical discussions that are related to the RFP. Unauthorized contact may be cause for rejection of the vendor's RFP response.

1.3. Notice of Intent to Propose (Optional)

Transmittal Letter Instructions

As soon as interest is determined the vendor should submit a transmittal letter that contains the following:

- **Statement of Interest**

  This statement shall indicate your firm's general interest and capability to perform the project. You may include a brief summary of any information that you feel might be especially important to City/County.

- **Contact Person**

  Please include the name, title, address, telephone number, fax number and e-mail of the key contact person for any questions regarding your proposal.

- **Signature of Authorized Representative**

Please email this Notice of Intent to Propose to rfp7422@indy.gov.

1.4. Pre-Proposal Conference

A Pre-Proposal Conference will be held to address vendor questions regarding the RFP.
All vendors are encouraged to attend this conference.

When: October 7, 2009 at 2:00 PM EDT at the following location:

Where: City/County Building
               Room 260
               200 E. Washington Street
               Indianapolis, IN 46204

Audio Participation: If you need to participate via telephone audio conferencing, please email your request to **rfp7422@indy.gov** by September 30, 2009 for connection information.

1.5.   RFP Questions and Answers

Submit Questions by Email to: **rfp7422@indy.gov**

Questions Deadline: **October 9, 2009 no later than 4:30pm EDT**

Answers Posted By: **October 14, 2009**

Important: **Reference the RFP No: 09-7422**
                                           Enterprise Resource Planning - Computer Software

Notes:

1. Questions submitted orally during the pre-proposal conference should also be submitted in writing to be assured of a proper response. Please be sure to reference the RFP by name and number when submitting questions.

2. Only the written answers provided will be binding on City/County. These answers shall represent City/County's official position and supersede any previous oral statements made during the pre-proposal conference or at any time by City/County staff.

3. Answers will be posted by October 14, 2009 on City/County's web site: http://www.indy.gov/Purch/BiddingOpportunities as an addendum to this RFP.

4. Vendors will be responsible for checking the web site for questions and answers, modifications to the RFP and any additional addenda regarding this RFP.

5. If a vendor finds conflicts, errors, discrepancies or ambiguities in the Proposal Documents or any sample form, or if the vendor is in doubt as to the intended meaning of any portion or provision therein, the vendor shall at once give written notice thereof to **rfp7422@indy.gov**, at least seven (7) consecutive calendar days prior to the Proposal Due Date.

6. No vendor shall be allowed any compensation or time extension by reason of any conflict, error, discrepancy or ambiguity.

1.6. Submitting Your Proposal

The Proposal must be in two sealed packages inside one box or envelope.
Cut out the label below and affix it to the outside of the box or envelope.

One sealed package will contain your proposal without the pricing information:
> Qty 1   - An original proposal signed by authorized representative of the vendor
> Qty 8   - Proposal copies signed by authorized representative of the vendor
> Qty 2   - CD-ROM containing the Proposal document without the pricing Information.

One sealed package will contain only pricing information:
> Qty 1   - An original proposal **with** pricing information (printed copies of your MS Excel
>   document), signed by authorized representative of the vendor
> Qty 8   - Printed copies of your MS Excel document containing the pricing Information.
> Qty 2   - CD-ROM containing only the pricing information (MS Excel document)

Please clearly identify all documents & electronic medium with:
> RFP No: 09-7422
> Vendor Name
> Contents

Deadline: October 27, 2009 at 12:00 Noon EDT

Notes: City/County will not consider any proposals received after the official deadline. City/County will not make any exceptions due to failure or delay of the U.S. Postal Service or any other delivery service, and vendors are strongly encouraged to take any steps necessary to ensure that the proposal is received on time.

Those submitting proposals do so entirely at their expense. There is no expressed or implied obligation by City/County to reimburse any individual or vendor for any costs incurred in preparing or submitting or evaluating proposals, or for participating in any demonstrations or interviews, including contract negotiations.


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SEALED PROPOSAL - DO NOT OPEN

RFP No:  09-7422

Enterprise Resource Planning (ERP)
Computer Software Solution

DUE DATE: OCTOBER 27, 2009 @ 12:00 noon EDT

Submitted By: _____
                    Name of Company
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Cut Out Label and
Affix to Outside of
Sealed RFP Box
or Envelope

2. Scope of Work

The ERP Computer Software Solution is comprised of the following application components. Vendors may bid on one or more or all of the '**core**' groups of computer software applications.

2.1. ERP Computer Software Product License(s):

1. **Financial Systems Core**
   a. General Ledger
   b. Billing / Accounts Receivable
   c. Accounts Payable
   d. Cash Management
   e. Fixed Asset Management and Maintenance
   f. Project Accounting
   g. Travel and Expenses

2. **Human Resources Core**
   h. Personnel Administration
   i. Benefits Administration
   j. Recruitment & Applicant Tracking
   k. Employee Development / Assessment

3. **Payroll Processing Core**
   l. Payroll
   m. Employee Time & Attendance

4. **Procurement Core**
   n. Purchasing
   o. E-Procurement, including Public Bid Management
   p. Contracts Management

5. **Budget Management Core**

6. **Grants Management Core**

2.2. Software Maintenance and Technical Support

2.2.1.   City/County seeks vendor proposals in the Appendix 3 - Software Pricing Worksheet for annual software maintenance and technical support services, based on 5 and 10 year plans. Vendors should respond with software licensing and maintenance fees which start at the time the software modules are placed into production.

2.2.2.   Optionally, vendors may propose (1) multi-year payment plans or financing of the ERP software applications with payments parallel to the expected ROI or realization of benefits as proclaimed by the vendor's bid, and (2) operational support plans (including SaaS, shared services, outsourced services or hosting services) along with their software solution cost proposal. These services can include hardware, systems software, databases and applications, and middleware, SOA, enterprise service bus products.

3. RFP Objectives

3.0.1. City/County will be replacing its current data processing systems with a state-of-the-art ERP software solution, embracing the best business practices contained in the software. This RFP was designed to foster quality responses from vendors with quality software solutions.

3.0.2. The vendor's response to this RFP should address how their solution provides the following features and functions which are important to City/County:

- ERP software with the application modules listed in Section 2 - Scope of Work, designed to work seamlessly together with a common look-and-feel and a common internal operational design, utilizing data from a single repository which is routed to end users to initiate action, approvals and decisions;

- Software which performs its intrinsic business functions correctly, efficiently and accurately;

- City/County-wide business process improvement by eliminating paper-based processes, redundant data collection, reliance on multiple tracking mechanisms and duplicative business functions between the many departments and agencies;

- Software which provides improved access to information and stronger decision-making capabilities;

- The ability to construct employee, vendor and public self-service portals;

- Dashboard construction with drill-down capability to seamlessly retrieve data across the various but integrated software modules comprising this ERP solution;

- User-based construction of reports and statistical analysis without programmer support;

- Budgeting and budget forecasting applicable to public sector budgeting practices (versus private sector processes);

- Centralized management of contracts, grants and projects;

- Management of MBE/WBE/VBE vendor performance, data and statistics;

- Streamlining of the purchasing process and public bids tracking while maintaining compliance with applicable laws;

- Single source of assets administration and maintenance;

- Real-time access to City/County's data when and where it is needed;

- Ability to automate manual departmental processes. Ability within the software systems to create business rules, workflows and approval tracking to provide the benefits of business process improvement and employee workload reduction;

- 'Push' technology which can be configured by department and by individual employee within the department.

4. City/County's Current Environment

4.1. Background Information

4.1.1. Indianapolis/Marion County has a current population of 900,000 citizens. City/County employs approximately 7,000 people and is comprised of approximately 60 departments and agencies.

4.1.2. The FY08 Budget ($1,132,744,516) represents a balanced spending plan for all funds. The City's Comprehensive Annual Financial Report (CAFR) 2008 is available at the following web site: http://www.indy.gov/eGov/City/Controller/Documents/2008 CAFR.pdf.

4.1.3. The Consolidated City of Indianapolis and Marion County is comprised of many local government departments and agencies. Uni-Gov was the beginning of consolidating like functions to reduce duplication of services within City/County. The overall goal of this unification is to create one standardized way of budgeting, processing transactions, overseeing finances and producing financial reports and the CAFR.

4.1.4. City/County's current computer systems were put into production beginning in the 1970's. Several disparate computer systems and databases manage City/County's financial transactions, budgets, payroll and assets. These systems which reside on the mainframe allow limited enterprise interaction and employee utilization. This general lack of integration, ease-of-use and functionality has resulted in the development of over 1100 shadow systems. The human resource and processing costs of supporting these outdated systems is substantial.

4.1.5. Technology and its accompanying process improvement benefits have evolved substantially and the City/County is seeking to improve the management of its finances, assets, budget and human resources.

4.2. Current Infrastructure

4.2.1. Current IBM Mainframe Hosted Programs
- FAMIS (Financials)
- ADPICS (Purchase Orders)
- FAACS (City Asset Management)
- GEAC (Human Resources Payroll)
- BPREP (Budget)
- FOCUS (Report Writer)
- SystemWide(Report Writer)

4.2.2. Current Distributed Computing Hosted Programs
- Vurv Express (Human Resources)
- ASSETMAX (County Asset Management)
- MS Dynamics HR (Courts)
- Public Safety ERP (Financials and Human Resources)
- CLASS (Scheduling & Financials for Parks and Recreation Dept.)
- 1100 shadow systems consisting of smaller third-party applications, MS Access databases, Excel spreadsheets, et al.

4.2.3. Desktop Architecture
- Desktop Operating System: Microsoft Windows(XP, v7) Operating Systems
- Office Productivity: Microsoft Office 2003, 2007
- Web Browser: Internet Explorer 7

4.2.4. Enterprise Architecture
Account Management
- Active Directory
- Radius
- Top Secret (IBM Mainframe)

Application Delivery: Citrix Presentation Server
Application Performance Management: Symphonic TrueView
Application Servers: .Net and JBOSS
Archival Services
- ASG ViewDirect (IBM Mainframe)
- LRS PageCenter X
- Symantec eVault

Business Intelligence: Microsoft PerformancePoint
Collaboration Services: Microsoft SharePoint Services
Database Management System (DBMS): MS SQL Server 2005 and Oracle DBMS 10g
Directory Protocol: LDAP
Directory Services: Active Directory
Document Management: FileNet P8
Domain Name Services: Windows DNS
Email: Microsoft Exchange
Enterprise Portal: Microsoft Office SharePoint System (MOSS)
Enterprise Service Bus: [none]
FTP: VSFTP
GIS: ESRI Suite of GIS Tools
Job Management: ASG Zeke & Zeb Tools (IBM Mainframe)
High Availability (HA)-Active/Passive Clusters: Microsoft Cluster Services
HA-Load Balancing: Citrix Netscaler
Load Testing: Mercury LoadRunner
Network Operating System: Windows Server 2003 R2
Report Services
- Business Objects Enterprise 11
- Focus (IBM Mainframe)
- SQL Server (2005) Report Services

Software Distribution: Altiris Client Management Suite
Transaction Server: CICS (IBM Mainframe)
Virtualization: VMware ESX 3.0
Web (HTTP) Servers: IIS and Apache

4.2.5. Network Architecture
Firewall: Juniper
IVR: Edify Voice Interaction Platform
Routers: Cisco
Switches: Cisco
Voice: Avaya-IP Switches and VoIP
VPN: Cisco

4.3. City/County's Data Processing Statistics

Payroll and Human Resources	Records
Active City / County Employee Counts (as of September 2009)	6,682
Number of Pay Checks/ACHs issued in 2008	164,862
Number of Pension Checks/ACHs issued in 2008	22,301
Number of 1099Rs issued in 2008	1,960
Number of Employment Applications Processed in 2008 (estimate)	20,000
Number of New Hires in 2008	953
Number of 1099s issued in 2008	1200
General Ledger	
Number of Balance Sheet Accounts (Asset and Liability)	160
Total Number of General Ledger Accounts	210
Journal Entries	30,000
Budget Recording and Budget Adjustments	30,000
Total General Ledger Transaction Count	750,000
Capital Assets	
Number of Capital Asset Records	85,000
Accounts Payable (2008 Counts)	
Number of Vendors on Vendor File	40,000
Number of AP Checks Written	110,000
Number of Invoices Paid	115,000
Purchasing (2008 Counts)	
Number of Purchase Orders Issued	30,334
Number of Requisitions	5,924
Project Accounting (2008)	
Total Number of Projects on Record	2,900
Number of Active Projects	450
Number of Project G/L Transactions	36,000
Grant Accounting	
Number of Active Grants in 2008	640

5. Evaluation Methodology

5.1. Overview

The evaluation process is meant to determine which proposal(s) can provide the best solution for City/County's current and future needs based on the information available and City/County's best efforts of determination.

5.1.1.   In general, City/County prefers to purchase an integrated full-function software solution supported by a single vendor, as opposed to a "best-of-breed" approach and multiple products from different vendors. Notwithstanding this preference, software vendors may propose:

- an integrated, single-source solution including their own and third party products which have been designed to interface with their own products in order to provide the required functionality, or
- a solution which provides the required functionality for a subset (one or more) of the application **core** groups (as listed in section 2.1) if substantial quality and/or cost benefit exists for this solution.

5.1.2.   City/County prefers software licensing terms specifying a perpetual site license eliminating the need to continually audit user counts on the many modules intrinsic to an integrated ERP software solution.

5.1.3.   City/County seeks to buy the best fit products at the most favorable, competitive prices with discounts equivalent to or greater than those given recently to similar-sized local city and state governments.

5.2. City/County's Preferences

City/County prefers a software solution:

5.2.1.   which operates in a web browser environment and has been designed and constructed to do business the way city and county governments operate in America today, and provides substantial business process improvement benefits;

5.2.2.   with substantial out-of-the-box functionality in order to limit the amount of customizations (i.e., changes to source code) made to the base application;

5.2.3.   which provides seamless integration between all ERP systems to capture the efficiencies and consistency gained by re-engineering City/County's business processes to current best practices;

5.2.4.   which integrates customizations to the ERP core applications via external programming, an application interface system or a middleware product;

5.2.5.   which allows the easy construction of web-based portals and dashboards providing substantial employee and public self-service capability in each application module;

5.2.6.   which is scalable, highly available and flexible to allow for future growth and future technology;

5.2.7.   which utilizes business rules / tables and workflows to develop software-based business processes ('push' technology) and eliminates most manual business processes.   Approval requests, tasks lists, action items, reports, requests for information are automatically pushed to employee dashboards and portals guiding the employee daily in the work needed to accomplish the agency/department's business. City/County will be interested in a solution which provides the framework, design and development environment for this important feature;

5.1.8.   which provides a standardized operational look and feel to the application users, i.e., a well designed, common and ergonomic user interface in application windows, report construction and layout;

5.2.9.   which includes development tools that will enable City/County to meet its future needs without becoming heavily dependent upon programmer consultants;

5.2.10.   which improves information analysis capabilities via dashboards, portals, graphs, etc., that will support enhanced decision-making capabilities;

5.2.11. which eliminates duplicative effort, eliminates most manual business processes, reduces the number of non-integrated systems, eliminates redundant data entry and reduces annual maintenance costs;

5.2.12. which supports a flexible chart of accounts structure meeting City/County governmental requirements re: budgeting, accounting methodologies, carryover, fiscal year periods, purchasing, contracts, grants and project accounting and CAFR reporting;

5.2.13. which integrates the capital asset management function with purchasing and financial information and supports GASB-34 accounting and reporting standards;

5.2.14. which provides the ability to budget in/across multiple years, and for a minimum of 6 years and track multiple funding sources to a single project;

5.2.15. which provides 2 to 3-second average response times for most employee data inquiries;

5.2.16. which provides the ability to create secondary data warehouses with automated replication for highly-intensive reporting/statistical analysis functions without impacting the response times of City/County's normal operational tasks on the primary data tables.

5.3. Selection Process

5.3.1. The public opening will acknowledge receipt of the proposals only. Details concerning pricing or the offering will not be announced. All proposals submitted, including pricing, shall become public record upon the execution of a contract.

5.3.2. City/County has contracted with firms (Bucher and Christian, Government Finance Officers Association) to create the RFP and facilitate the evaluation and selection processes. The selection of vendors at each level will follow the description outlined in the table below and the selection of the final vendor(s) will be based upon this process.

Proposal Selection Steps		
Level	**Description**	**Target # of Vendors**
Level 1	Detailed proposal evaluation	NA
Level 2	Software demonstrations	Three (3)
Level 3	Discovery sessions	Two (2)

5.3.3. **Level 1 - Detailed Proposal Evaluation:** After the proposal due date, City/County will review all proposals received. The proposal evaluation criteria should be viewed as standards that measure how well a vendor's approach meets the desired requirements and needs of City/County, and may include, but is not limited to the following factors: responses to the RFP requirements (Appendix 2 - Requirements Worksheet); responses to Questions (section 4 in the Vendor's Response Package); responses to the list of RFP Objectives (RFP section 3); responses to the list of City/County's Preferences (RFP section 5.2); and other information presented in the Vendor's Response Package.

The following points system will be used in selecting the vendors to elevate to Level 2:

Evaluation Categories	Points
Total software license costs (initial + 10 year product updates)	20
Compatibility with City/County's essential/functional/technical requirements	40
Integration capability of other ERP and non-ERP software applications	20
Overall ERP product vision, technology capability, compatibility with current City/County technology architecture platforms, and ability to provide value added technology services and architecture components	30
Self-service, portal, dashboard and reporting capabilities	20
Business process improvement capability (business rules & workflows)	30
City and County government solution experience and qualifications	30
MBE/WBE/VBE/Local software firm	10
TOTAL POSSIBLE POINTS	**200**

5.3.4.   If the vendor is not proposing a complete integrated ERP system, but a "best of breed" solution for a subset (one or more) of the **core** applications, a separate evaluation using similar criteria will weigh the best-of-breed product against similar applications proposed by comprehensive solution bidders:

Evaluation Categories	Points
Total software license costs (initial + 10 year product updates)	20
Compatibility with City/County's essential/functional/technical requirements	40
Integration Capability with the other ERP software applications	30
Overall ERP product vision, technology capability, compatibility with current City/County technology architecture platforms, and ability to provide value added technology services and architecture components	20
Self-service, portal, dashboard and reporting capabilities	20
Business process improvement capability (business rules & workflows)	30
City and County government solution experience and qualifications	30
MBE/WBE/VBE/Local software firm	10
TOTAL POSSIBLE POINTS	**200**

5.3.6.   **Level 2 Evaluation - Software Demonstrations:** Vendors reaching Level 2 will be asked to demonstrate their software applications and verify their software's capability in meeting the requirements. Software demonstration presentations will be at a time and place to be determined by City/County staff. The vendor will be notified in advance of the specifics if such a presentation is required.

5.3.7.   **Level 3 Evaluation - Discovery Sessions:** After the software demonstrations, City/County may require vendor(s) to provide one or more formal presentations to City/County officials to further explain or clarify their proposed solution. Any presentation will be at a time and place to be determined by City/County staff. The vendor will be notified in advance of the specifics if such a presentation is required. The scheduling of presentations or the commencement of discussions does not signify a commitment by the City/County to execute an agreement or to continue discussions with the vendor.

5.3.8.   **Contract Negotiations:** After identifying one or more responsible vendors who appear to be most advantageous, City/County may enter into contract negotiations with them. If at any time the contract negotiations are judged to be ineffective, City/County may cease all activities with a vendor and begin/continue contract negotiations with another vendor, and the process may continue until a contract is executed. As part of this process, City/County may request "best and final offers" from one or more vendors, and City/County reserves the right to add additional criteria during "best and final offers" negotiations.

6. Vendor's Response Package

6.0.1.   Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposed products and support services to satisfy the requirements of the RFP.   All responses should be in MS Word format.

6.0.2.   To compare competing proposals equally, each vendor must use the Vendor's Response Package (Appendix 1 in this RFP) to compile their proposal. Failure to return all documents and follow all proposal layout requirements may result in disqualification due to non-responsiveness. It is organized in the following major sections:

Section	Response
1	Executive Summary
2	Application Software Solution
3	Software Maintenance and Support Solution
4	Questions
5	Company Background
6	Client References
7	MBE/WBE/VBE Participation
8	Vendor's Exceptions to the RFP
9	Vendor's Notarized Signature Page
10	Attachments
	Attachment 1 - Requirements Worksheet (MS Excel Document)
	Attachment 2 - Marketing Materials
	Attachment 3 - Sample Technical/Support Documents
	Separate Sealed Package Proposed Pricing Worksheet (MS Excel Document)

6.0.3.   Each proposer should include their specific product information and marketing material in Attachment 2. This will further clarify to City/County the differences and specialties of each software vendor's products.

7.   Terms & Conditions

7.1.   City/County's Rights

7.1.1.   City/County may modify or amend this RFP at any time. If it becomes necessary for City/County to revise any part of this RFP, the revision(s) will be posted on City/County's web site http://www.indy.gov/Purch/BiddingOpportunities. The submission deadline may be extended, at the sole option of City/County, to allow vendors the opportunity to revise their proposals .

7.1.2.   City/County reserves the right to modify the scope of the RFP (delete or add functionality) and/or the requirements up until the final contract signing.

7.1.3.   City/County reserves the right, where it may serve the best interest of City/County, to request, in writing, additional information or clarification, in writing, from respondents.

7.1.4.   City/County reserves the right to waive irregularities and immaterial defects in the RFP or RFP responses.

7.1.5.   City/County reserves the right to reject any or all proposals if it determines that proposals are not responsive to the RFP, and then seek new proposals or take other action.

7.1.6.   City/County reserves the right to award a contract(s) based upon written proposals, without discussion or negotiations if deemed to be in City/County's best interest.

7.1.7.   City/County reserves the right to reject the response of any persons or vendors that have previously defaulted on any contract with City/County or who have engaged in conduct that constitutes a cause for debarment or suspension.

7.1.8.   City/County reserves the right to cease all contract negotiation activities at any time and reject all proposals if such action is determined by City/County to be in its best interest.

7.2.   Proposal Life
7.2.1.   Vendors agree that their pricing is valid for acceptance for a minimum of one year after proposal submission to City/County.

7.3.   Type of Software License and Pricing Terms

7.3.1.   City/County requires that licenses for software be "perpetual" (i.e., City/County purchases and retains the license to use the software forever).

7.3.2.   Pricing must be submitted as a "fixed" price nature (i.e., license fees, maintenance, support cost schedule for the first 5 years are presented), and shall be broken out as provided in the price proposal section. Furthermore, vendors must provide a "not-to-exceed" maintenance schedule for years 6-10 (e.g., 2% escalator per year). Proposals which do not submit pricing on a fixed price basis may be eliminated from further consideration.

7.4.   Competitive Pricing With Response

7.4.1.   All firms submitting proposals are encouraged to submit the most competitive proposal possible, as the failure to do so may lead to elimination prior to software demonstrations.

7.5. Attention To Detail, Unresponsive Proposals and Elimination From Consideration

7.5.1. When responding to this RFP, please follow all instructions carefully. Please submit proposal contents according to the outline specified and submit all hard copy and electronic documents according to the instructions. Failure to follow these instructions may be considered an unresponsive proposal and may result in immediate elimination from further consideration.

7.6. Errors in Proposals

7.6.1. Vendors will not be allowed to change or alter their proposals after the deadline for proposal submission. City/County reserves the right, however, to correct obvious errors such as math errors in extended pricing (not unit pricing). This type of correction may only be allowed for "obvious" errors such as arithmetic, typographical, or transposition errors. Any such corrections must be approved by the Purchasing Division and countersigned by the vendor. Vendors are advised to make sure that their proposals are true and correct when submitted. All proposals submitted in response to this RFP become the property of City/County and public records, and may be subject to public review.

7.7. Public Record. Use, Disclosure and Confidentiality of Information.

7.7.1. This RFP distributed by City/County including any other required terms and conditions will be incorporated by reference and made a part of any resulting contract. The information supplied by a vendor as part of an RFP response will become the property of City/County. Proposals will be available to interested parties in accordance with the Indiana Access to Public Records Act (IC 5-14-3). None of the proposal responses will be made available to the public until after negotiation and execution of a contract.

7.7.2. The public opening will acknowledge receipt of the proposals only; details concerning pricing or the offering will not be announced. All proposals submitted, including pricing, shall become public record upon execution of a contract.

7.7.3. To protect any confidential information contained in their proposal, vendors must identify in the RFP response that data and other material to be protected, and must cite to the specific exemption in Indiana State Code that would permit such exemption from disclosure. Failure by the vendor to strictly comply with the requirements of state law on the protection of confidential and/or trade secret information may result in disclosure of such information.

7.7.4. To the extent requested by a vendor and allowed by law, City/County will treat trade secrets and confidential financial information as confidential (if designated as confidential and submitted separately in a sealed envelope). The vendor must request confidential status before the proposals are opened. If City/County believes that information designated as confidential should not be treated as such, the vendor will be notified and afforded reasonable time to present appropriate legal justification for non-disclosure prior to any release of the information. Note: Pricing information shall not be considered confidential.

7.8. Incurred Costs

7.8.1.   Those submitting proposals do so entirely at their own expense. There is no expressed or implied obligation by City/County to reimburse any individual or firm for any costs incurred in preparing or submitting proposals, from providing additional information when requested by City/County, or for participating in any selection demonstrations or interviews, including contract negotiations.

7.9. Project Executive Committee

7.9.1.   City/County's Project Executive Committee will play the main "governance" role on the project and will make a final recommendation to the Information Technology Board. The Project Executive Committee will base its recommendation(s) on input from the Proposal Evaluation Team, as well as its own assessment of the proposed solutions.

7.10. Proposal Evaluation Team

7.10.1. The Proposal Evaluation Team (the "Evaluation Team") will be responsible for tasks such as reviewing and evaluating all received proposals, participating in meetings to elevate proposals at each decision point, attending all software demonstrations, and participating in any other evaluation tasks that may be required, such as site visits. The Evaluation Team's objective is to make a recommendation on a final vendor to the Project Steering Committee.

7.10.2. City/County has contracted with firms Bucher and Christian, and GFOA (Government Finance Officers Association) to assist in the proposal evaluation process. Each vendor will agree to cooperate with the personnel of these organizations.

7.11. End User Team

7.11.1 The End User Team will consist of subject matter experts from the various City/County departments and City/County stakeholders who have knowledge of specific business processes and are interested in assisting with the evaluation process. The End User Team will support the Evaluation Team during the evaluation process by participating in activities such as the review and evaluation of software demonstrations.

7.12. Proposal Withdrawal & Modification

7.12.1. City/County may allow a vendor's representative bearing proper authorization and identification to sign for, receive, and withdraw the vendor's unopened proposal prior to submission deadline. A vendor desiring to modify its proposal may do so by withdrawing the initial submission and then submitting a modified proposal prior to the deadline.

7.13. Award

7.13.1. City/County may at its sole option, purchase software and support services from one vendor or multiple vendors if deemed to be in the best interest of City/County.

7.13.2. City/County reserves the right to award a contract(s) based upon the written proposals, without discussion or negotiations if deemed to be in City/County's best interest. A proposing offer should be based on the most favorable terms from a price, business requirements and technical standpoint.

7.13.3. The City/County shall not be deemed to have finally selected a vendor until a contract has been successfully negotiated and signed by both parties. All contracts are subject to the approval of City/County's legal counsel, the Controller and the Information Technology Board. All contracts entered by City/County are public records.

7.13.4. The software solution(s) selected will be what the City/County determines to be the best product(s) for its use, best interests, benefits and needs, and not necessarily the software solution(s) with the lowest prices.

7.14. No Obligation to Proceed

7.14.1. City/County is under no obligation to proceed with this project or any subsequent project, and may cancel this RFP at any time without the substitution of another, if such cancellation is deemed in the best interest of City/County. Furthermore, City/County may reject any and all proposals, to waive any irregularities or informalities in a proposal, and to issue a new or modified RFP, if it is found to be in the best interest of City/County.

7.15. Modifications After Award

7.15.1. City/County reserves the right to modify the scope of work as it deems necessary during implementation of the selected software solution. The vendor shall notify City/County of any additional cost or reduction in cost related to the change in scope of work, in writing, prior to proceeding with the scope change and shall not initiate such change without written approval.

7.16. Assignment

7.16.1. The vendor may not assign any award made as a result of this RFP, without prior written consent of City/County.

7.17. Purchase Orders

7.17.1. The vendor shall furnish no licenses, products, services, equipment, materials or labor unless a properly executed purchase order is received from City/County directing the supply of the same.

7.18. Taxes

7.18.1. City/County is exempt from Federal, State and Local Taxes and will not be responsible for any such taxes in connection with the award of this contract.

7.19. Licenses and Permits

7.19.1. The successful vendor shall furnish City/County upon request any and all documentation regarding necessary licenses, permits, certifications and/or registrations required by the laws or rules and regulations of the City of Indianapolis, Marion County, other units of local government, the State of Indiana and the United States. The vendor certifies that it is now and will remain in good standing with such governmental agencies and that it will keep its licenses, permits, certifications and/or registrations in force during the term of the agreement.

7.20. Software License

7.20.1. The vendor shall grant City/County a perpetual, non-transferable, non-exclusive site license under the terms of this Agreement to use the application software on its network. City/County shall have the absolute right to upgrade or replace any equipment in the network and continue to use the application software on the network. City/County shall not be required to pay the vendor any additional licensing fees or other fees as a result of using the application software in conjunction with the upgraded or replacement equipment on the network.

7.20.2. City/County shall be granted the right to copy the software for archival, backup, recovery or training purposes. All copies of the software are subject to the provisions of the license, and all titles, patent numbers, trademarks, and copyright and restricted rights notices shall be reproduced in such copies. City/County shall also be permitted to maintain the software on multiple machines (computer servers) for its own use for backup, recovery and disaster recovery purposes.

7.20.3. Vendor agrees to maintain a copy of the software source code for the applications licensed to City/County with an escrow agent, and to list City/County as authorized recipient of this source code for the usual and customary reasons agreed upon in the sales contract.

7.21. Software Maintenance Fees

7.21.1. The vendor shall waive or discount the software maintenance fees for each software application module until City/County begins the implementation project for that software application module. The services to be provided in the software maintenance agreements shall include, but are not limited to, telephone, email, video-conferencing and remote access support, and software upgrades for the application software modules purchased by City/County.

7.22. Additional Modules and Users

7.22.1. City/County will require "price protection" for 2 years from the date of the signed contracts for modules that are listed in the RFP but are not initially purchased, and for additional City/County users.

7.23. Vendor's Warranty

7.23.1. Vendor's warranty for the software solution will include warranting to the functional requirements in the RFP for a period of 24 months following final acceptance.

7.24. Severability

7.24.1. If any of the terms or conditions of this RFP are held to be invalid or unenforceable they will be construed to have the broadest interpretation which would make them valid and enforceable under such holding. Invalidity or the inability to enforce a term or condition will not affect any of the other RFP terms and conditions.

7.25. Use of City/County's Name

7.25.1. Upon entering into an agreement, the successful vendor agrees not to use the name of the City of Indianapolis or Marion County in relation to the agreement in commercial advertising, trade literature or press releases without the prior written approval of City/County.

7.26. Sales and Services Agreement Acceptance

7.26.1. The vendor should view the Sample Sales and Services Agreement found in Appendix 4 of this RFP. Additional provisions as needed or required by the City will be discussed with the vendor during any negotiation process. The vendor does NOT need to sign this agreement before submitting the response but rather review and note in the response package any areas that need to be discussed with the City if selected for this project. The final contract with the vendor will include similar language to that shown in the Sample Sales and Services Agreement and specific language for this project. Note: Any proposed exceptions to this document should be listed in detail in Section 8 of the Response Package, attached and returned with the proposal.

8.   Glossary

Word/Acronym	Definition
ADPICS	Advanced Purchase Inventory Control System (Mainframe)
BPREP	Budget Preparation (Budget mainframe system)
Enterprise	Refers to the City/County agencies supported by ISA
ISA	Information Services Agency
IT	Technology supported by the Information Services Agency
FAACS	Fixed Asset and Accounting Control System (Asset Management mainframe system)
FAMIS	Financial Accounting and Management Information System (Financial mainframe system)
INFOR	Payroll Mainframe system
MBE/WBE/VBE	Minority ,Woman or Veteran Business Enterprise
OFM	Office of Finance and Management
OTIS	Online Time Information System
Push Technology	A data distribution technology in which selected data are automatically delivered into the user's computer at prescribed intervals or based on some event that occurs. Contrasted with "**pull technology**" in which the user specifically asks for something by performing a search or requesting an existing report, video or other data type.
RFP	Request for Proposal
ROI	Return On Investment
SaaS	Software as a Service
Shadow System	Set of records maintained at a local level independent of the official records, usually in Excel spreadsheet or an Access Database.
SOA	Service-Oriented Architecture - A service-oriented architecture (SOA) is the underlying structure supporting communications between services. SOA defines how two computing entities, such as programs, interact in such a way as to enable one entity to perform a unit of work on behalf of another entity.

9. Appendices

Appendix 1 - Vendor's Response Package

Appendix 2 - Requirements Worksheet (MS Excel Document)

Appendix 3 - Software Pricing Worksheet (MS Excel Document)

Appendix 4 - Sample Sales and Services Agreement